

<p style="text-align: center;">CM/ECF</p> <p style="text-align: center;">User's Guide</p> <p style="text-align: center;">Part 1</p> <p>US Bankruptcy Court, Southern District of Iowa</p>	<p>Chapter</p> <p style="text-align: center;">Utilities</p>
	<p>Section</p>

To **maintain your accounts in CM/ECF** select **Utilities** from the CM/ECF Menu options.



Utilities Screen

Your Account

- CM/ECF Login – Available to Attorney
- Change Your Client Code – Available to Attorney
- Change Your PACER Account – Available to Attorney
- Internet Payment History – Available to Attorney and Trustee
- Internet Payments Due – Available to Attorney and Trustee
- Maintain Your ECF Account – Available to Attorney and Trustee
- Review Billing History – Available to Attorney
- View PACER Account Information – Available to Attorney
- View Your Transaction Log – Available to Attorney and Trustee

Miscellaneous

- Legal Research.... – Available to Attorney and Trustee
 - Law Dictionary
 - Medical Dictionary
 - Westlaw via the Internet
- Mailing.... – Available to Attorney and Trustee
 - Creditor Mailing Matrix
 - Mailing Info for a Case

- Verify a Document – Available to Trustee



CM/ECF User's Guide Part 1 US Bankruptcy Court, Southern District of Iowa	Chapter
	Utilities
	Section
	Your Account – CM/ECF Login

PACER users only.

Allows you to change to a CM/ECF account while logged in with a PACER account.



CM/ECF User's Guide Part 1 US Bankruptcy Court, Southern District of Iowa	Chapter Utilities
	Section Your Account – Change Your Client Code

PACER users only.

Allows entry of a new client code, used for reporting charges made to the current PACER account.



The current value of the client code is .JOH004 .



Enter new Client code:

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	<p align="center">Section</p> <p align="center">Your Account – Internet Payment History</p>

- Use this option to monitor your Internet Payment History.
- Provides a list of all payments of charges incurred via the Internet.
- Payments appear on the list by receipt number.
- You can select payments by date range.

STEP 1	Select Utilities
STEP 2	Select Internet Payment History

 Bankruptcy • Adversary • Query • Reports • Utilities • Logout 				
U.S. Bankruptcy Court Southern District of Iowa - Test Database Internet Payment History for RACER , 2/13/2003 to 3/13/2003				
Date Paid	Description	Payment Method	Receipt #	Amount
2003-03-12 14:06:25	Motion for Relief from Stay(02-00075-4-lmj) [motion,mrlfsty] (75.00)	credit card	1111B15293	\$ 75.00
2003-03-12 14:20:56	Motion for Relief from Stay(02-00075-4-lmj) [motion,mrlfsty] (75.00)	credit card	1111B15301	\$ 75.00

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CM/ECF User's Guide Part 1 US Bankruptcy Court, Southern District of Iowa	Chapter
	Utilities
	Section
	Your Account – Internet Payments Due

- Use this option to monitor your Internet Payments Due.
- Provides a list of fees due for payment. This indicates the Continue Filing button was selected instead of Pay Now.

STEP 1	Select Utilities
STEP 2	Select Internet Payments Due

Summary of current charges:

Date Incurred	Description	Amount
2001-05-10 10:53:00	Amended Schedules (with D, E, F)(1-00-00101-FRM)	\$ 20.00
2001-05-10 11:47:09	Amended Schedules (with D, E, F)(1-00-00101-FRM)	\$ 20.00
		Total: \$ 40.00

Pay Now

Continue Filing

You will receive a phone call from the court regarding any fees **not paid at the time of filing or by the end of the day** when you use the Internet Credit Card option.

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CM/ECF User's Guide Part 1 US Bankruptcy Court, Southern District of Iowa	Chapter Utilities
	Section Your Account – Change Your PACER Account

PACER users only.

Displays a login screen to allow entry of a different PACER account. The new account may be designated as the default PACER login.

PACER Login

Notice
This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.

Click on the question mark for instructions.

Authentication

Login:

Password:

Client code:

☐ Make this my default Pacer login

Login Clear

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	<p align="center">Utilities</p>
	<p>Section</p> <p align="center">Your Account – Maintain Your ECF Account</p>

Account of current user appears for setup or modifications.

First, Last and Middle Name	Required Information
Generation	
Title	
Type	Entered by court personnel
Office	Enter Name of Law Firm
Address on Lines 1, 2 , 3	Required Information; mailing address
City, State, Zip	Required Information

County	Enter county of mailing address
Country	Enter USA
Phone	Enter in 515-555-5555 format
Fax	Enter in 515-555-5555 format
SSN	Optional
Tax Id	Optional
Bar Id	Court assigned ID or SSN – entered by court personnel
Bar Status	Entered by court personnel
Initials	Entered by court personnel

More Than One Office?

If you have more than one office, select one location for the mailing address. Use the additional addresses in the E-mail information screen to include the e-mail addresses of your other offices.

E-mail Information

Use to specify how you would like to be notified of CM/ECF filings and the e-mail address where you want to receive the notification.

CM/ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

E-mail information for John Miller

Primary e-mail address

Send the notices specified below

☒ to my primary e-mail address

☐ to these additional addresses

☒ Send notices in cases in which I am involved

☐ Send notices in these additional cases

☒ Send a notice for each filing

☐ Send a Daily Summary Report

Format notices ☒ html format for Netscape or ISP e-mail service

☐ text format for cc:Mail, GroupWise, other e-mail service

Primary e-mail address	Specify complete e-mail address for Notice of Electronic Filing Notices
Send the notices specified below	Select one or both options: to my primary e-mail address and/or to these additional addresses (add additional e-mail addresses in text box) Use additional addresses for e-mail address of multiple offices.
Send notices in cases in which I am involved	Select this box to receive notices on cases you are involved
Send notices in these additional Cases	Check this box and enter the case numbers of cases you want to received notices
Send a notice for each filing	Select to receive a Notice of Electronic Filing for each case
Send a Daily Summary Report	Select to receive a Summary Report containing all cases
Format notices html format for Netscape or ISP e-mail service text format for cc:Mail, GroupWise, other e-mail service	Check one choice:
Return to Account screen	Click to continue making changes to your account and/or submit those you made.
Clear	Click to clear screen if changes are incorrect.

More User Information

Use this to change your login name and/or password.

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

More User Information for John Miller

Login Last login 12-06-2002 10:59

Password Current login 12-06-2002 10:59

Prid 45 Create date 03/12/2002

Registered Y Update date 11/19/2002

Internet Credit Card N

Groups Attorney

Login	Use the change your login
Password	Use to change your password. When you type in the new password it is visible. When you access the screen again, the password is hidden.
Return to Account screen	Click to continue making changes to your account and/or submit those you made.
Clear	Click to clear screen if changes are incorrect.

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	<p align="center">Section</p> <p align="center">Your Account – Review Billing History</p>

PACER users only.

Displays the number of CM/ECF pages accessed and charges incurred for the PACER account in use. If you enter your client code when accessing CM/ECF the charges are totaled for each code.

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CM/ECF User's Guide Part 1 US Bankruptcy Court, Southern District of Iowa	Chapter Utilities
	Section Your Account – View PACER Account Information

PACER users only.


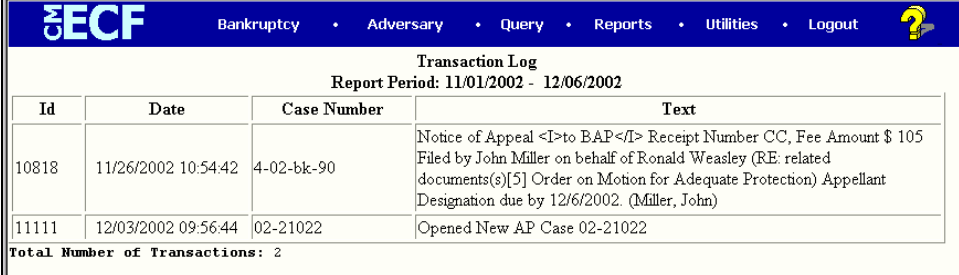
Displays your current PACER login and client code.

Your current PACER account is **pa0004**
Your current client code is **JOH004**



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	<p>Section</p> <p style="text-align: center;">Your Account – View Your Transaction Log</p>

Displays details of all your transactions, docketing, you entered for the time specified.

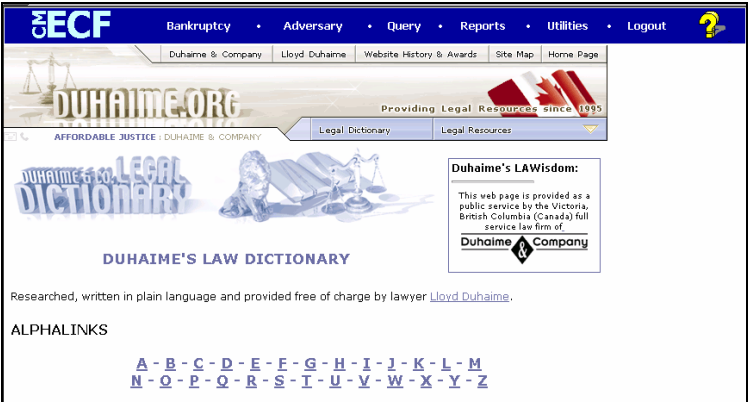

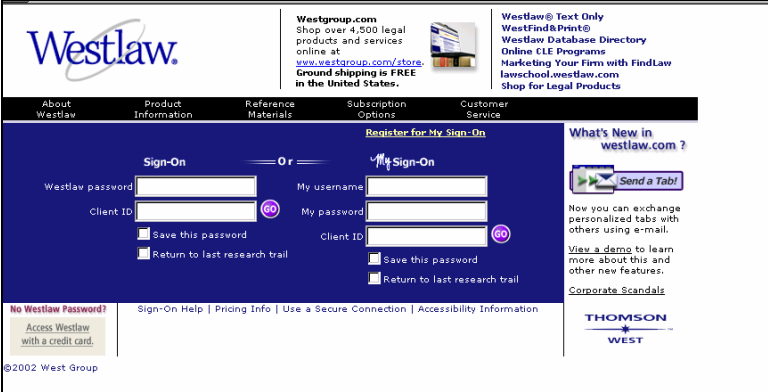



Id	Date	Case Number	Text
10818	11/26/2002 10:54:42	4-02-bk-90	Notice of Appeal <I>to BAP</I> Receipt Number CC, Fee Amount \$ 105 Filed by John Miller on behalf of Ronald Weasley (RE: related documents(s)[5] Order on Motion for Adequate Protection) Appellant Designation due by 12/6/2002. (Miller, John)
11111	12/03/2002 09:56:44	02-21022	Opened New AP Case 02-21022

Total Number of Transactions: 2

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	<p>Section</p> <p style="text-align: center;">Miscellaneous – Legal Research</p>

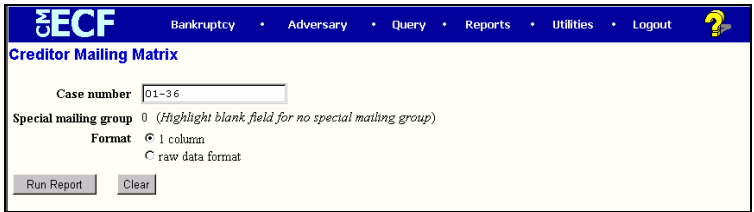

<p>Legal Dictionary</p> <p>A link to a website researched, written in plain language and provided free of charge by lawyer Lloyd Duhaime.</p>	
<p>Medical Dictionary</p> <p>A link to the On-Line Medical Dictionary provided by the CancerWEB Project (sponsored by British Telecommunications.)</p>	
<p>Westlaw via the Internet</p> <p>A link to Westlaw's commercial website. A subscriber account is required</p>	

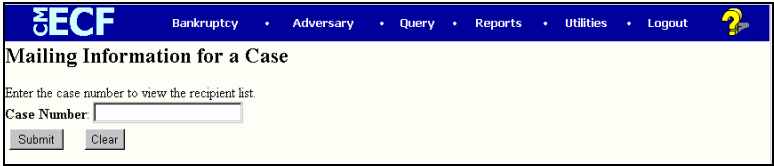
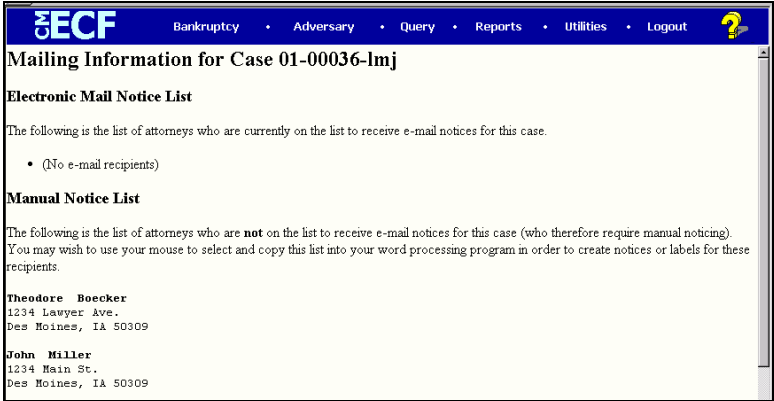
<p style="text-align: center;">CM/ECF</p> <p style="text-align: center;">User's Guide</p> <p style="text-align: center;">Part 1</p> <p>US Bankruptcy Court, Southern District of Iowa</p>	Chapter
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Utilities

Miscellaneous – Mailing

PACER users only.

<p>Creditor Mailing Matrix</p> <p>Displays a list of creditor names/addresses for a single case, either by single column label format or in raw data format. Can be limited to one or more special mailing groups.</p> <p>The list contains those creditors uploaded at case opening and may or may not include parties docketing or filing a pleading to the case. All creditors on this report were added through Creditor Maintenance option in CM/ECF and used by the BNC for court generated notices.</p>	
<p>Run Report Results</p>	

<p>Mailing Info For A Case</p> <p>Displays a list of those who receive e-mail notices and those who require manual noticing for a single case.</p>	
<p>Results Mailing Info For a Case</p>	

CM/ECF User's Guide Part 1 US Bankruptcy Court, Southern District of Iowa	Chapter
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	Section
	Create Mailing Labels for a Case

Reserved for future use.



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	<p align="center">Section</p> <p align="center">Miscellaneous – Verify a Document</p>

Trustee Only

Verifies the electronic “signature” of a document is the same as when the document was filed. If it is different, the document has been altered.

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Verify Document(s)

Case Number

99-12345, 199-bk-12345 or 1-99-bk-12345

Specify the number of the docket entry containing the document to be verified.

Document Number:

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CM/ECF User's Guide Part 1 US Bankruptcy Court, Southern District of Iowa	Chapter
	Document Preparation
	Section

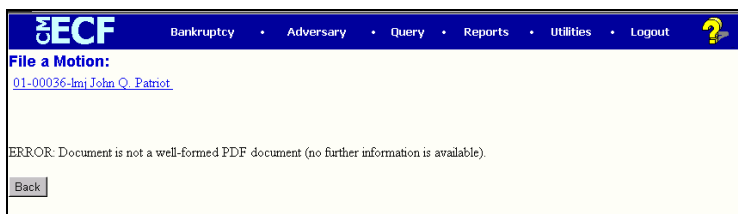
Documents uploaded using the CM/ECF System must be in PDF format, with the exception of the matrix (.txt format).

Adobe Acrobat PDF Writer program allows creation of PDF files.



CM/ECF User's Guide Part 1 US Bankruptcy Court, Southern District of Iowa	Chapter Document Preparation
	Section Format (.txt or PDF)

Documents uploaded to CM/ECF must be in a PDF format, with the exception of the creditor matrix (.txt format).



Error Message

If the document is not in the correct format, you will receive an error message.

To prevent formatting errors, view the document you are uploading to CM/ECF System before accepting it to ensure it appears as you intended.

To view a PDF file:

- Open Adobe Acrobat program.
- Select the file from the menu bar.
- Select Open.
- Click on the location and file name of the document for viewing.
- Use the scroll bar or buttons on the tool bar to move through multi-page or large resolution documents.
- Click on View from the menu bar for other viewing options.

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CM/ECF User's Guide Part 1 US Bankruptcy Court, Southern District of Iowa	Chapter Document Preparation
	Section Convert to PDF

Conversion of any word processing document to a Portable Document Format (PDF) is required before submission to the CM/ECF System. To accomplish this you must have Adobe Acrobat Writer software installed.

Appendix A provides instructions for converting a file created by a Windows based program to PDF. (These instructions are also available on our website, www.iasb.uscourts.gov.) In some instances, some of these steps may be eliminated depending on the software you use and the configuration of your system.



CM/ECF User's Guide Part 1 US Bankruptcy Court, Southern District of Iowa	Chapter Document Preparation
	Section Image/Scan a Document

Appendix B provides basic steps for scanning and saving a document using Adobe Acrobat. These instructions are also available on our website, www.iasb.uscourts.gov.) In some instances, steps may be eliminated or different dependent on the scanning software you use and the configuration of your system.



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	<p align="center">Document Preparation</p>
	Section
	<p align="center">File Name</p>

Name Your File

If you submit your PDF documents on disk name your file using:

- Case Number
- Debtor's Last Name
- File type abbreviation

Example: If you file a motion in case number 01-00800 for debtor, Smith, the file name would appear as follows:

01-00800smithmo.pdf

In the above example the case file 01-00800, Debtor last name is Smith and the document is a motion. The file type abbreviation for motion is mo.

CAUTION: Remember to convert your file to PDF before submitting to the court.

File Name Abbreviations

mo	Motion
tr	Trustee
obj	Objection
pl	Plan
ans	Answer
apl	Appeal
oth	Other
cl	Claims

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	<p align="center">Section</p> <p align="center">Submitting Document/Attachments</p>

Signature Line Format

The attorney inserts: /s/[**name of attorney**] or /s/[**name of client**] in lieu of his or her original signature. The attorney retains possession of the original document with original signature(s) of attorney and client.

Authenticity of Documents

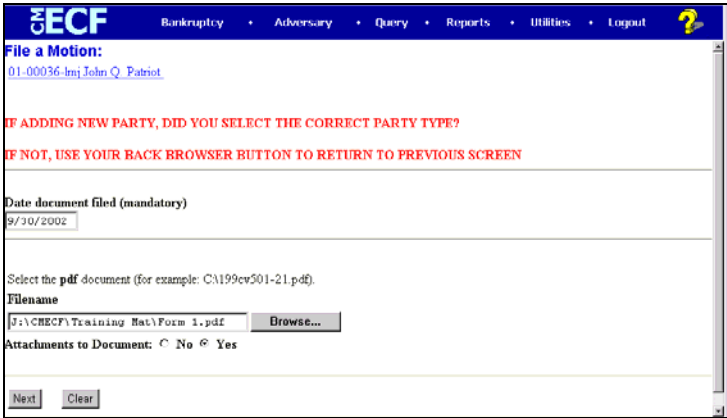
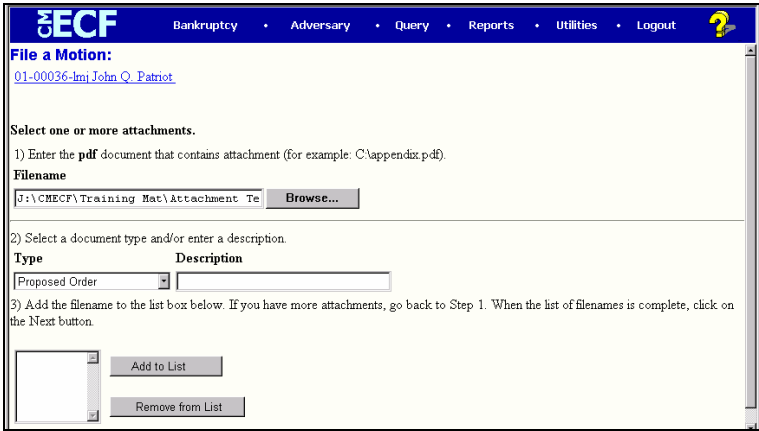
The paper version and electronically filed version of a document must be exact duplicates. The attorney and client original signature on the paper version constitutes his or her attestation that no changes, alterations or other modifications have been made with the sole exception that the paper version shall contain original signatures. The attorney must retain the original signed document (electronically filed) through the time period for appeal.

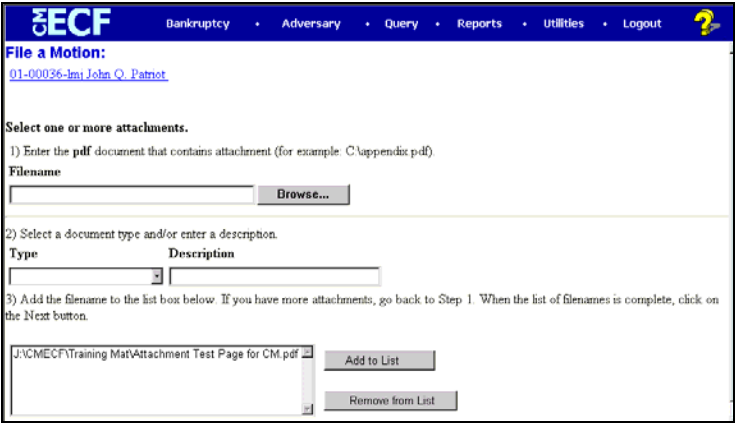
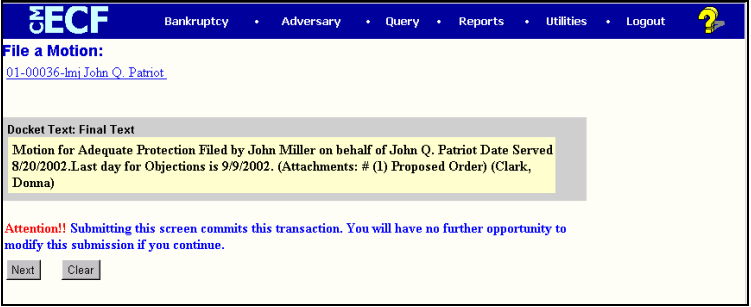
Document Submission

- **Browse to Attach Main Document**

<p>Document Selection Screen</p> <p>Click on Browse and select the location of the main PDF document. Remember to view the document before attaching.</p>	
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- Attachment to Main Document

<p>Document Selection Screen Indicating Attachments</p> <p>Click Yes to attach document.</p>	
<p>Browse to Pick PDF File Attachment</p> <p>Click on Browse Button and select the directory and file for the attachment.</p>	
<p>Type/Description</p> <p>Optional fields. Select type from pick list and enter description.</p>	<p>Types: Appendix, List of 20 Largest Creditors, Exhibit, Index, Affidavit, Revision, Schedule, Supplement, Volume(s)</p>

<p>Add to List</p> <p>Click Add to List and file location of attachment appears on the list. If there is more than one attachment, add another attachment and select Add to List.</p>	
<p>Docket Text Reflecting Attachment</p>	

Limitation on Attachments

Limit of twenty (20) 8 ½” x 11” pages attached. If more pages are necessary, attach a page summarizing attachment and give name, location and phone number where the attachments are available for viewing.



CM/ECF User's Guide Part 1 US Bankruptcy Court, Southern District of Iowa	Chapter Document Preparation
	Section Style Guide

This guide contains the preferred style practices for all users of the CM/ECF System in the Southern District of Iowa.

The intention of the guide is to make everyone's task easier, whether they are entering data or querying for data in the CM/ECF System. The use of a common set of styles to create docket entries results in entry of information in a uniform manner. This in turns allows efficient queries in CM/ECF and eliminates duplication of data in the CM/ECF database.

Successful queries require very exact matches on search data including punctuation, abbreviations and upper or lower case.



CM/ECF User's Guide Part 1 US Bankruptcy Court, Southern District of Iowa	Chapter Document Preparation
	Section Style Guide – Add Parties

When adding new parties to the CM/ECF System, the names and addresses must conform to the criteria listed below.

REFERENCES: Chapter: Document Preparation, Section: Attorney Style Guide - Search for Parties.

1. Search the CM/ECF System for the party to add BEFORE adding any party to a case. .
2. Use upper and lower case for all names and capitalize the first letter in a proper noun. Use single spacing between all names.

Correct Style:

Wallace D Smith
United Services Fidelity and Guaranty

3. Do not use punctuation between initials and names.

Correct Style:

J J Jones
Smith Inc
C W Bradford Ltd

4. When typing names with upper and lower case letters or hyphens, do not insert spaces.

Correct Style:

Patricia DeLaGarza
Patrick MacDougal
Kathleen O'Brien
Mary Smith-Baker

5. If the party does not have a middle name, leave that field blank. Do not enter NMI (no middle initial.)

Correct Style:

Last Name: Martin

Middle Name:

First Name: Robert

6. If a party has multiple names such as Robert John Kennedy Martin, add the extra names in the Middle Name box.

Correct Style:

Last Name: Martin

Middle Name: John Kennedy

First Name: Robert

7. Enter the entire business name in the Last Name box. Do not use the First Name box or the Middle Name box.

Correct Style:

Last Name: Jones Body Shop

Middle Name:

First Name:

8. Do not use the ampersand sign for “and” unless it is part of the company name on the document.

Correct Style:

B & D Company

Cameron & Associates

9. Avoid abbreviations unless it is part of a company name on the document.

Correct Style:	Not
Ford Motor Credit	Ford Motor Co
First Federal Association	1 st Federal Assoc

10. Enter US and USA without any spaces or punctuation.

US Attorney Office (DOE)
US Attorney Office (DOL)
US Attorney Office (FSA)
US Attorney Office (HHS)
US Attorney Office (HUD)
US Attorney Office (SBA)
US Attorney Office (USDA)
US Attorney Office (USDA/RD)
US Dept of Agriculture/Rural Development
US Dept of Agriculture/Office of General Counsel
US Dept of Education
US Dept of Housing and Urban Development (Regional
Counsel)
US Dept of Health and Human Services (Office of General
Counsel)
US Dept of Health and Human Services (Social Security
Administration)
US Dept of Labor (Office of Solicitor)
US Dept of Veteran Affairs
US Environmental Protection Agency
US Farm Service Agency
US Internal Revenue Service (Associate Area Counsel)
US Internal Revenue Service (Insolvency Group)
US Small Business Administration
US Trustee

Iowa Dept of Revenue and Finance
Iowa State FSA Office

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CM/ECF User's Guide Part 1 US Bankruptcy Court, Southern District of Iowa	Chapter
	Document Preparation Section Style Guide – Add Party Addresses

When adding new parties to the CM/ECF System, the names and addresses must conform to the criteria listed below.

1. Abbreviate post office addresses without a space or punctuation between the P and O. Spell out Box.

Correct Style:

PO Box 1359

PO Drawer 34321

2. Type out the entire name of the street designator. When it is necessary to use abbreviations, use the following. Do not use punctuation after the abbreviation.

Use:	For:
Ave	Avenue
Bld	Boulevard
Ctr	Center
Cir	Circle
Ct	Court
Dr	Drive
Expy	Expressway
Hts	Heights
Hwy	Highway
Is	Island
Jct	Junction
Lk	Lake
Ln	Lane
Mtn	Mountain
Pkwy	Parkway
Pl	Place
Rdg	Ridge
Rd	Road
Sq	Square
St	Street
Sta	Station

Ter	Terrace
Trl	Trail
Tpke	Turnpike
Vly	Valley
Way	Way

3. Use digits for numbers in addresses.

Correct Style:

3224 E 26th Street

425 6th St

1 Valley Plaza

4. When there is a street address and a post office box address for a debtor, include both the post office address and street address. The line immediately above the city, state, and zip code is the line where the mail is delivered. In the example below it is delivered to the PO Box because the zip code+4 corresponds to that address.

Correct Style:

John J Johnson

4218 Elmwood Ln

PO Box 1477

Bentonville AK 40453-1477

5. Use the second and or third line of the address for building name, suite number, floor, firm name or attention.

Correct Style:

Arthur Andersen and Associates

Attn Terri Brooks

John Hancock Building Ste 2600

8723 Michigan Ave

Chicago IL 60604-2600

6. When the address contains an apartment number, unit number or suite number abbreviate Apartment, Unit or Suite. Place the Apt, Ste or Unit on the second or third line of the address. **DO NOT USE #** to refer to the number.

Use:	For:
Apt	Apartment
Rm	Room
Unit	Unit
Ste	Suite

Correct Style:

Barbara Bixby
322 W Shady Ln Apt 334
Austin TX 78701-0322

7. When the address has geographic directions, use the following:

Use:	For:
N	North
S	South
NE	Northeast
SW	Southwest
E	East
W	West
SE	Southeast
NW	Northwest

Correct Style:

John Smith
100 NW 10th St
Washington DC 10001-2335

8. The city, state and zip code must be the only information on the last address line. Use the full ten-digit zip code if at all possible.

Correct Style:

Queens NY 11122-2335

9. Use c/o to indicate In Care Of. DO NOT USE the % sign.

Correct Style:

Manual Ortega Jr
c/o Manuale Ortega Sr
6612 E 6th St
El Paso TX 79901-0612

10. Foreign Addresses: The bottom line of the address must show only the name of the country, written without abbreviations and in Capital letters. Do not place the postal codes (zip codes) of foreign country designations on the last line of the address. Do not underline the country name.

Correct Styles:

Inge Dietrick-Fischer
Hartmannstrasse 7
5300 Bonn 1
GERMANY

Joyce Browning
2045 Royal Rd
London WIP 6HQ
ENGLAND

Helen Saunders
1010 Clear St
Ottawa ON CANADA
K1A 0B1

11. Military Address or APO Destinations: overseas military addresses must contain the APO or FPO designations along with a two-character state abbreviation of AE, AP or AA and the zip code. This must be the only information on the bottom line of the address.

AE Armed forces in Europe, the Middle East, Africa
and Canada
AP Armed forces in Pacific
AA Armed forces in Americas excluding Canada

Correct Style:

Sgt John Smith
C Company 237 Armor
Unit 21103 Box 512
APO AE 09014

12. Address is limited to five (5) lines.

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	<p>Section</p> <p style="text-align: center;">Style Guide – Search for Parties</p>

BEFORE adding parties to a case, search the CM/ECF System for the party you want to add.

Search for the party using:

- Name or
- Social security number or
- Tax ID number.

If the system finds the correct name, select it to eliminate multiple versions of the same party name.

Even an entry as simple as, United States, can cause confusion if everyone enters this differently. Use the Style Guide to avoid the following example:

United States may also appear as: UNITED STATES, U.S., US, USA, U.S.A. or U.S. of A.

Correct Style: USA

The CM/ECF System is case letter sensitive so use capital letters when appropriate.

REFERENCES: Chapter: Document Preparation, Section: Style Guide, Create New Parties. Use when you determine you need to add a new party to the case.

○

<p align="center">CM/ECF</p> <p align="center">User's Guide</p> <p align="center">Part 1</p> <p align="center">US Bankruptcy Court, Southern District of Iowa</p>	<p align="center">Chapter</p> <p align="center">Document Preparation</p>
	<p align="center">Section</p> <p align="center">Style Guide – Create New Parties</p>

REFERENCES: Chapter: Document Preparation, Section: Style Guide - Add Parties. Use to review formatting requirements regarding name punctuation, capitalization, etc.

Debtor(s)

- Add debtors to cases using names and addresses exactly as they appear on the petition. Only add debtor(s) **after** searching the CM/ECF System. Search by name, SSN or Tax Id.

Search Screen

Add New Party to Case Screen

- Add the title as party text if the debtor(s) has a title.
 - The name of the debtor(s) without the party text appears in docket text.
 - Party text description does not appear on notices.

- Party text description appears on the face of the docket report following the name of the debtor name. Examples:
Jose Garza, Administrator of the Estate of Sylvia Garza
Alamo Limestone, a Texas Corporation
Catherine V. Ruiz, Official Administrator of Lottery Winnings
- Add an entry in the SSN field or the Tax ID field even if the social security number for the individual debtor or tax identification number for a business debtor is unknown.
SSN: 000-00-0000
Tax ID: 00-0000000
- Remember to select the debtor party role.

Plaintiff and Defendant

- Add plaintiff(s) and defendant(s) to cases using names and addresses as they appear on the complaint. Only add plaintiff(s) and defendant(s) **after** searching the CM/ECF System.
- Do not add mailing addresses for plaintiff(s) or defendant(s) when you represent the plaintiff(s) or defendant(s).
- Use the Party Text field to add a name title.
- Remember to select the plaintiff or defendant party role.

Creditor(s)

- Add creditor(s) **after** searching the CM/ECF System. You will likely find the creditor you search for.
The same creditor is added to many different cases. Creditors such as Ford Motor Credit should only be in the CM/ECF System once. Avoid using different names for the same creditor. Example:

Correct Style: Ford Motor Credit

DO NOT USE: Ford Motor Credit Company
Ford Motor Credit Co.
Ford Motor Credit Corporation
Ford Motor Credit Company, Inc.
Ford Motor Credit Corp.
Ford Motors Credit Company
Ford Motor Credit Company (“FMCC”)

- Do not add mailing addresses for creditors when you represent them. You are their contact person.
- Do not add mailing addresses for creditor(s). If an address appears after searching and finding a creditor, delete the address fields before accepting party information.
- Do not add titles for creditors.
- Remember to select the creditor party role.

○

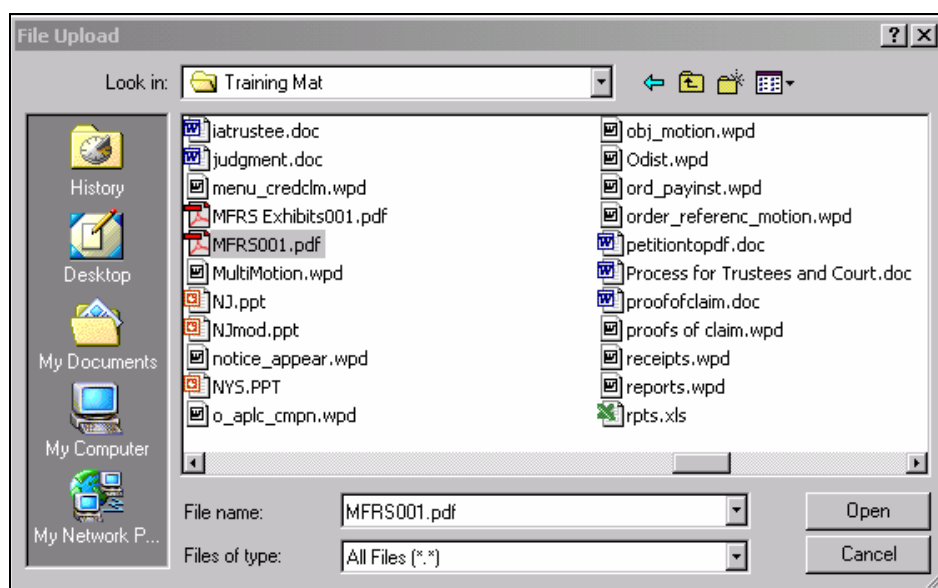
<p style="text-align: center;">CM/ECF</p> <p style="text-align: center;">User's Guide</p> <p style="text-align: center;">Part 1</p> <p style="text-align: center;">US Bankruptcy Court, Southern District of Iowa</p>	Chapter
	<p style="text-align: center;">Document Preparation</p>
	Section
	<p style="text-align: center;">Style Guide – State Abbreviations</p>

AL	Alabama	NV	Nevada
AK	Alaska	NH	New Hampshire
AZ	Arizona	NJ	New Jersey
AR	Arkansas	NM	New Mexico
AS	American Samoa	NY	New York
CA	California	NC	North Carolina
CO	Colorado	ND	North Dakota
CT	Connecticut	MP	N. Mariana Isl.
DE	Delaware	OH	Ohio
DC	District of Columbia	OK	Oklahoma
FL	Florida	OR	Oregon
GA	Georgia	PA	Pennsylvania
GU	Guam	PR	Puerto Rico
HI	Hawaii	RI	Rhode Island
ID	Idaho	SC	South Carolina
IL	Illinois	SD	South Dakota
IN	Indiana	TN	Tennessee
IA	Iowa	TX	Texas
KS	Kansas	UT	Utah
KY	Kentucky	VT	Vermont
LA	Louisiana	VA	Virginia
ME	Maine	VI	Virgin Islands
MH	Marshall Island	WA	Washington
MD	Maryland	WV	West Virginia
MA	Massachusetts	WI	Wisconsin
MI	Michigan	WY	Wyoming
MS	Mississippi	AA	Armed Forces Americas
MO	Missouri	AE	Armed Forces Europe
MT	Montana	AP	Armed Forces Pacific
NE	Nebraska		

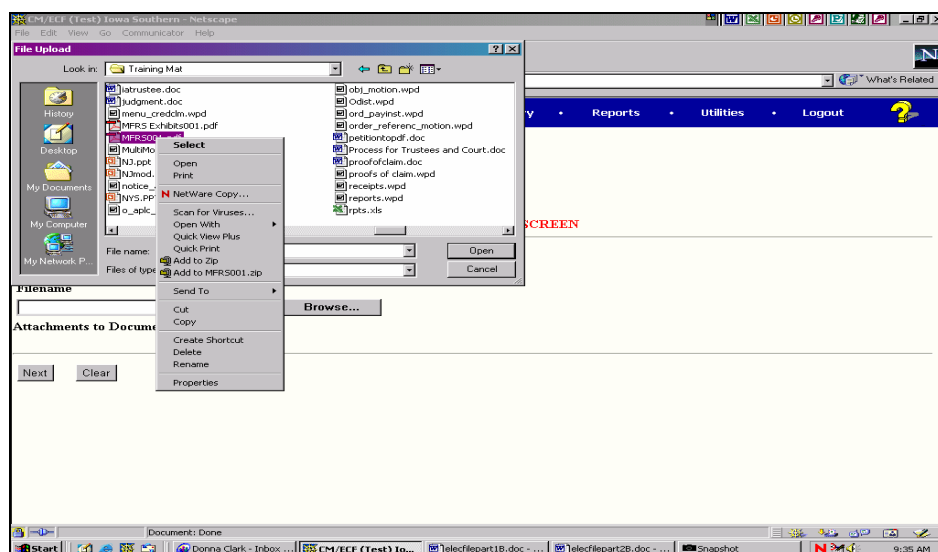
○

<p style="text-align: center;">CM/ECF</p> <p style="text-align: center;">User's Guide</p> <p style="text-align: center;">Part 1</p> <p>US Bankruptcy Court, Southern District of Iowa</p>	<p>Chapter</p> <p style="text-align: center;">Document Preparation</p>
	<p>Section</p> <p style="text-align: center;">Review of PDF Document Before Attachment</p>

Verify each PDF document BEFORE you attach it to the file. Locate the document and highlight with a single mouse click.



Right click on the file name with your mouse and select open.



This launches the Adobe Acrobat Reader and displays the contents of the imaged document.

Verify the document is correct.

Close or minimize the Adobe application if this is the correct file.

Click open on the File Upload dialogue box.

CAUTION: The PDF file for the motion is not the ATTACHMENT. The attachment is another supporting document, such as affidavits or exhibits.

CM/ECF User's Guide Part 1 US Bankruptcy Court, Southern District of Iowa	Chapter
	Notice of Electronic Filings
	Section

The Notice of Electronic Filing (NEF) serves as your confirmation that the court received the filing. At this point the entry of the court's docket is official.

All registered participants of the system who are a party in the case or requested to receive information on a particular case, receive a NEF automatically every time a docket entry is made in a case. The e-mail contains a hypertext link to take the user directly to the text of the document.

Individual or Summary Notices

You can select whether you prefer to receive the NEF:

Individual basis - one e-mail for each filing, issued when the item is docketed. You know immediately when an item is docketed. This can fill up your mailbox quickly.

Summary Report – one e-mail listing all of the filing in the attorney/trustee cases for that day. Reduces the amount of e-mail received. Summary e-mails contains information regarding multiple cases.

Refer to: Chapter: Utilities, Section: Maintain Your ECF Account to select individual or summary report.

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<p style="text-align: center;">CM/ECF</p> <p style="text-align: center;">User's Guide</p> <p style="text-align: center;">Part 1</p> <p>US Bankruptcy Court, Southern District of Iowa</p>	<p>Chapter</p> <p style="text-align: center;">Notice of Electronic Filings</p>
	<p>Section</p> <p style="text-align: center;">One Free View</p>

The NEF also provides electronic participants **one free view** of the filed document, both for documents they file and for documents others file.



Some documents are accessible with the standard hyperlink on the document number, and others will have a message directing you to an attachment. When this message appears on the Notice of Electronic Filing, a PDF icon provides you a link to the document to view, print and/or save the document.

- If you view your e-mail in “html format”, the message says: (See attachment to view, print, or save this document)
- If you view your e-mail in “text”format” the message says: See attachment to view the document

Proof of Claim NOEF



The NOEF for a Proof of Claim does not contain a link to the Proof of Claim. You must use PACER and run the Claim Register to view the claim.

Saving a Notice of Electronic Filing

These instructions apply from the point where you view the e-mail containing the attached .pdf document. Once the document is saved you can view or print the document at a later time.

Step 1	<ul style="list-style-type: none"> • Click on the link to the document in the NEF. • The document loads into Adobe Reader. • A toolbar with a diskette icon appears at the top of the Adobe Reader screen.
Step 2	<ul style="list-style-type: none"> • Click on the diskette icon on the toolbar. • A dialogue box, <i>Save As</i>, appears over the document.

Step 3	Complete the following data fields: <ul style="list-style-type: none">• <i>Save in:</i> Select the drive and directory to save the file• <i>File name:</i> Name the file. Example: 00-00508smithmotion.pdf• <i>Save as type:</i> Leave at Acrobat (*.pdf) default
Step 4	Click the Save button.



CM/ECF User's Guide Part 1 US Bankruptcy Court, Southern District of Iowa	Chapter
	Court Assistance
	Section

Contact Donna Clark at (515) 323-2834 for general information and questions regarding CM/ECF.

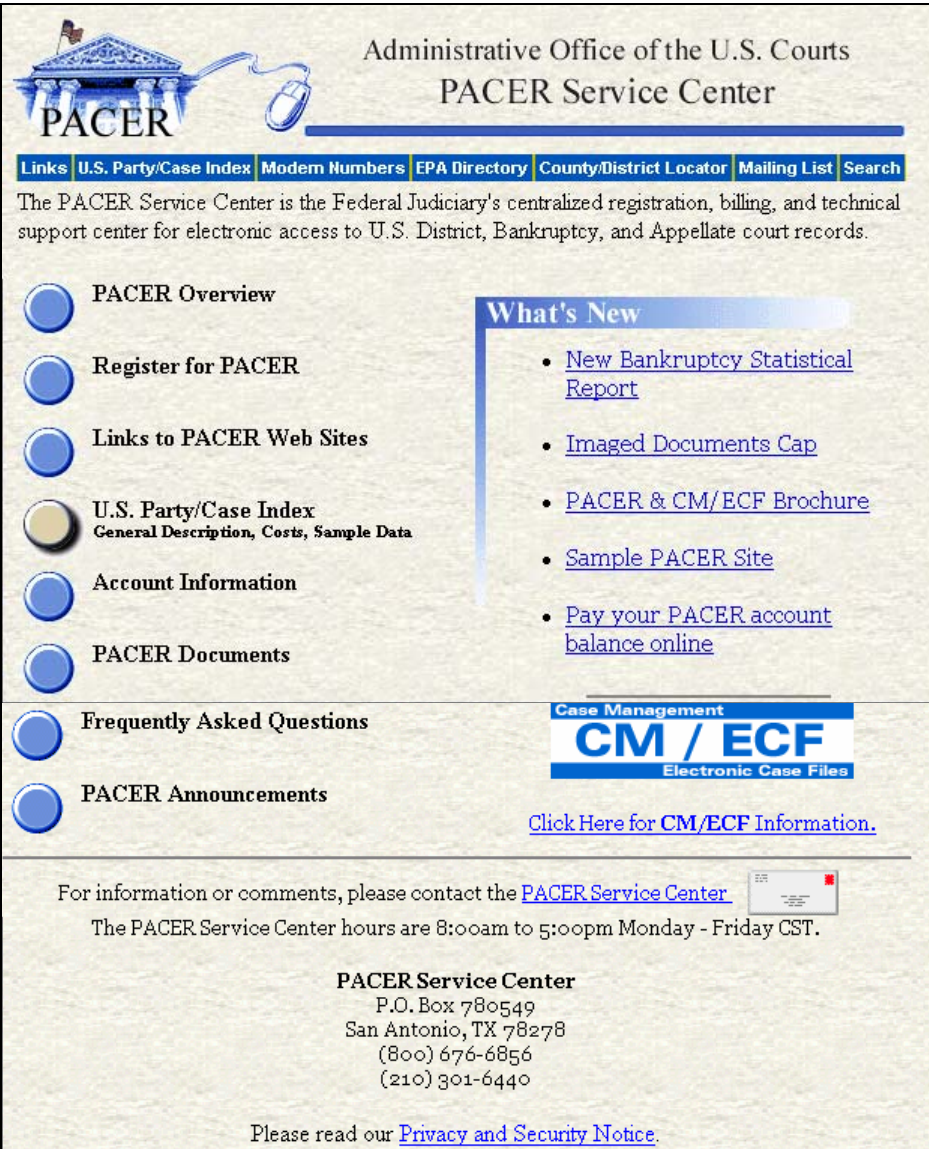
Contact Ginny Satterstrom at (515) 323-2843 for questions regarding CM/ECF training.

○

CM/ECF User's Guide Part 1 US Bankruptcy Court, Southern District of Iowa	Chapter
	Pacer Service Center
	Section

Access the Pacer Service Center on the web at

<http://pacer.psc.uscourts.gov>











PACER

Administrative Office of the U.S. Courts
PACER Service Center

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CM / ECF
Electronic Case Files

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For information or comments, please contact the [PACER Service Center](#)

The PACER Service Center hours are 8:00am to 5:00pm Monday - Friday CST.

PACER Service Center
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San Antonio, TX 78278
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(210) 301-6440

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**UNITED STATES BANKRUPTCY COURT
FOR THE SOUTHERN DISTRICT OF IOWA**

Conversion to PDF File

Conversion of any word processing document to a Portable Document Format (PDF) is required before submission to the CM/ECF System. To accomplish this you must have Adobe Acrobat Writer software installed.

The following provides instructions for converting a file created by a Windows based program to PDF. In some instances, some of these steps may be eliminated depending on the software you use and the configuration of your system.

Step 1	Open the document to convert.
Step 2	Click on the File drop down menu and select the Print option. The print dialog box appears. Select the option to change the selected printer. A drop down window menu with a list of printer choices appears.
Step 3	Select Adobe PDFWriter . Click on Print button in the dialog box. The file does not actually print; instead the option to save the file as a PDF appears.
Step 4	In the Save PDF File As dialog box, assign and type a file name. Make sure that the List Files of Type window displays PDF files (*.PDF) . Click on OK to save the file as a PDF document.
Step 5	The imaged/scanned document can now be filed electronically or moved to a disk.

Optional Feature

Edit Document Info	Open the Acrobat PDFWriter Document Information - Located in the lower left corner of the dialog box allows editing of the PDF document properties before saving the document.
View PDF File	A check box located in the right corner of the dialog box allows the Acrobat document to open once you click on Save .

ADD

CAUTION: If you are completing a PDF Fill-in-the-blank form, these instructions are not applicable.

Additional Options

New versions of WordPerfect and Word and Word for Windows may have options to convert a document using:

- Click on **File**; select **Create Adobe PDF**, [Print via PDFWriter]. Proceed with Step 4 above.
- Click Acrobat icon on toolbar (appears like Acrobat document). Follow instructions appearing on subsequent screens.

Insert Page(s) into Existing PDF Document

1. Open the main PDF document (document to insert pages).
2. From the menu bar select, Documents.
3. Select, Insert Pages.
4. A dialogue box opens.
5. Select the PDF file to insert into the main PDF document.
6. Double click.
7. A dialogue box opens.

Designate where in the open PDF document you want to add the page(s)

**UNITED STATES BANKRUPTCY COURT
FOR THE SOUTHERN DISTRICT OF IOWA**

Image/Scan a Document

The following provides basic steps for scanning and saving a document using Adobe Acrobat. To accomplish this you must have Adobe Acrobat Writer installed. In some instances, steps may be eliminated or different dependent on the scanning software you use and the configuration of your system.

Step 1	<p>Open the Acrobat Exchange program and click on the File drop down menu.</p> <p>Select the Import option and then click on Scan.</p> <p>Note: If using Adobe Acrobat 3.0/3.1, click on the File drop down menu and then select Scan option.</p>
Step 2	<p>Select the type of document to image. One or more of the following options may appear:</p> <ul style="list-style-type: none"> • Single-sided page [one page only] • Single-sided stack [multiple pages] • Double-sided page [one page only] • Double-sided stack [multiple pages]
Step 3	<p>Click on Scan after making a selection from Step 2.</p> <p>Note: If your scanning software only allows scanning of a single-sided page and you are scanning multiple pages or a double-sided document, following instructions above for each page of the document. Each page is added to the end of the document. DO NOT save the document until all pages are scanned.</p>
Step 4	<p>A window appears to select desired scanning settings. You can also preview the document. Click on Preview.</p> <p>Note: Set resolution at 300dpi.</p> <ul style="list-style-type: none"> • After selecting scanning settings, click Scan. • Once scanning process is complete, the document displays on the screen. Verify the document. • If document is not acceptable, close without saving and begin the scanning process again. If only a part of a multi-page document is unacceptable, save the document and the unacceptable pages may be re-scanned and then replaced. <p>Note: For multiple page documents scanned using the single-sided page option, each pages display individually before scanning the next page. Verify each page individually.</p>

Step 5	After verification, Save the document. Click on File drop down menu and select the Save As option.
Step 6	In the Save As dialog box, select the drive and folder to save the document.
Step 7	Assign the filename to the document in the File name window. <ul style="list-style-type: none">• Be sure the Save as type window shows Acrobat (*.pdf)• Be sure the optimize box is checked.
Step 8	The imaged/scanned document can now be filed electronically or moved to a disk.

TOP TEN PITFALLS AND HOW TO AVOID

1. Who Am I?

Remember to check the party ROLE drop down menu for the party you add and identify their role in the case, i.e. debtor, creditor, plaintiff, etc.

CM/ECF (Test) Iowa Southern - Netscape

File Edit View Go Communicator Help

Back Forward Reload Home Search Netscape Print Security Shop Stop

Bookmarks Location: https://ecf-test.iastb.circ8.dcn/cg-bin/login.pl?63526453522251-L_916_0-1

What's Related

ECF Bankruptcy Adversary Query Reports Utilities Logout

Party Information
Jimmie J. Jones SSN:456-78-9123

Office Address 1 543 NE 54th St

Address 2 Address 3

City Des Moines State IA Zip 50313

County Polk Country USA

Phone Fax

E-mail

ProSe no Role Debtor (db:pty)

Party text

Alias... Review... Add all aliases before clicking the Submit button.

Submit Cancel Clear

Debtor (db:pty)

Consultant (consult:prf)

Counter-Claimant (cc:pty)

Counter-Defendant (cd:pty)

Cred. Comm. Chair (ccmch:pty)

Creditor (cr:cr)

Creditor Committee (ccrm:pty)

Cross-Defendant (crd:pty)

Cross-Claimant (cxc:pty)

Debtor (db:pty)

Debtor In Possession (dbpos:pty)

Defendant (dft:pty)

Examiner (ex:prf)

Interested Party (intp:pty)

Interim Trustee (intr:pty)

Interpleader (i:pty)

Intervenor (inv:pty)

Intervenor-Defendant (id:pty)

Intervenor-Plaintiff (ip:pty)

Joint Debtor (jdb:pty)

Judge (jud:jud)

Document: Done

Start Donna Clark... CM/ECF (T... snapshot jleclepart1...

10:10 AM

2. Where Am I?

The debtor's county of residence determines the divisional assignment, not by where it is convenient for counsel to attend the 341 meeting.

ECF Bankruptcy Adversary Query Reports Utilities Logout

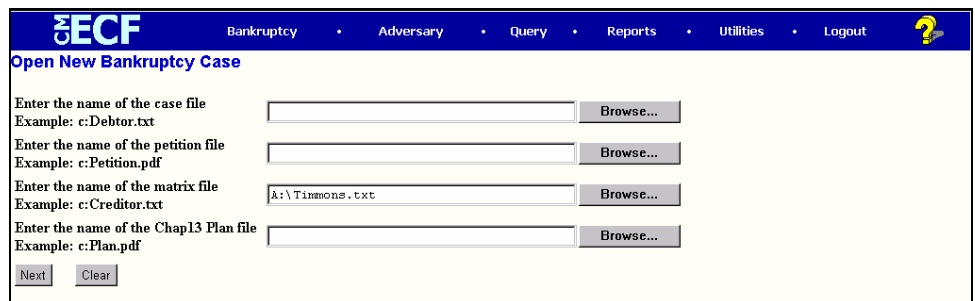
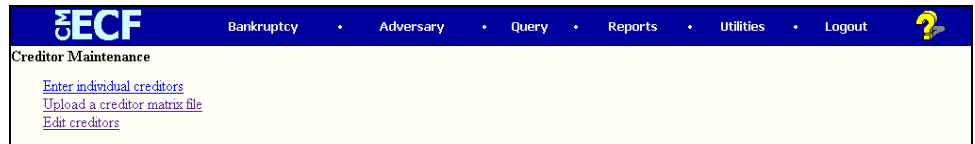
Open New Bankruptcy Case

Divisional Office is set to **Des Moines** based on the zip code **50002** of the debtor

Next Clear

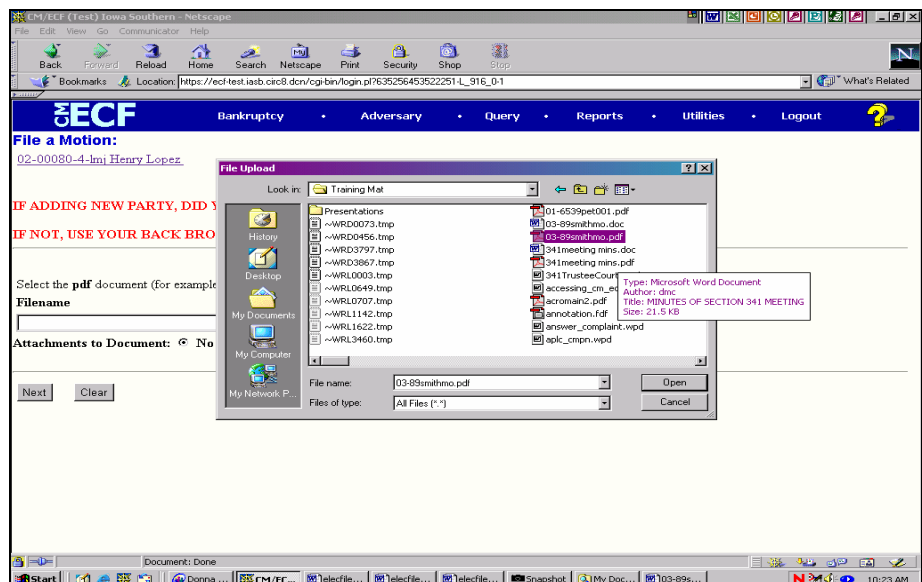
3. Matrix, Matrix. Who's got the matrix?

The matrix is part of the bankruptcy petition software. When entering a case via Open a BK Case, you must still remember to initiate a **separate** step to upload the creditor matrix file into the database. Note: This does not apply if you use the Case Upload option. A browse option appears to select your matrix. If you use the “One Touch” system with software packages this also uploads the creditor matrix.



4. Every document is unique and deserves its own name.

When you fail to give unique names to documents you scan, you will undoubtedly soon be unable to find anything in your documents folder. **Refer to User's File Guide Part 1, Chapter: Document Preparation, Section: File Name for hints on naming files.**



5. The term verifications stems from “verity” or truth.

Attorneys should not file verifications or amended documents without first having secured their client’s approval and original signature on a document. The document is retained in the attorney’s file.

6. Oops I did it again!

You probably don’t need a Motion to Withdraw a Document that is incorrectly filed. Use the code Withdrawal Document in Other/Misc.



The screenshot shows the ECF (Electronic Case Filing) interface. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below the navigation bar is a section titled "Miscellaneous". A dropdown menu is open, displaying a list of document types: Transcript, Verification of Matrix, Voluntary Petition Chapter 11, Voluntary Petition Chapter 12, Voluntary Petition Chapter 13, Voluntary Petition Chapter 7, Voluntary Petition Chapter 9, and Withdrawal of Document. The "Withdrawal of Document" option is highlighted in purple. Below the dropdown menu are two buttons: "Next" and "Clear".

7. More creditors than you know what to do with?

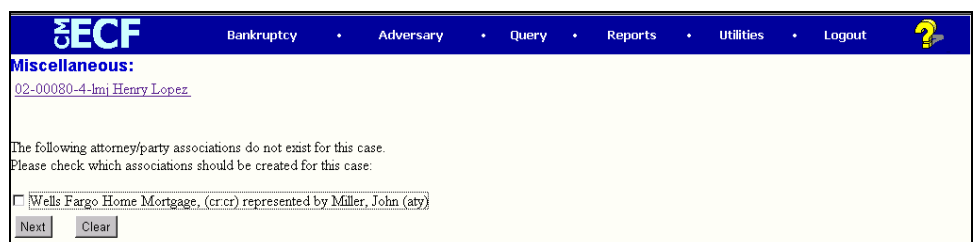
If the debtor has found more creditors after the bankruptcy has been filed, it is the attorney’s responsibility to file amended schedules, matrix and a notice with the court. It is also the attorney’s responsibility to notice the added creditor(s) of the bankruptcy and all applicable deadlines in addition to paying the court the \$20.00 filing fee. **Refer to User’s Guide Part 2, Chapter: Processing Motion, Section: Amendments.**

8. Avoid embarrassment. Have an adequate credit card balance.

If the attorney files a pleading or a case and the credit card is declined, there can be an entry on the court docket indicating the card was declined. ECF sends an e-mail to all participants in the case.

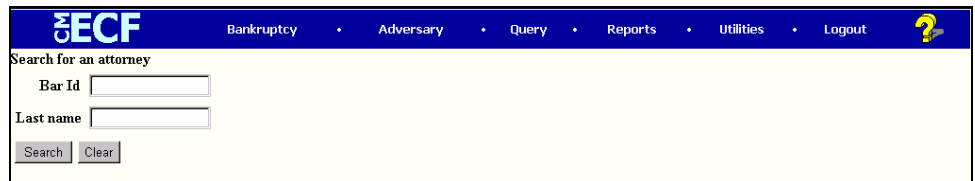
9. How come the attorney didn’t get the e-mail?

DID YOU CHECK THE ASSOCIATION BOX WHEN THE FIRST PLEADING WAS FILED IN THE CASE?




The screenshot shows the ECF (Electronic Case Filing) interface. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below the navigation bar is a section titled "Miscellaneous:". Under this section, the text "02-00080-4-lmj Henry Lopez" is displayed. Below this text, a message states: "The following attorney/party associations do not exist for this case. Please check which associations should be created for this case:". Below the message, there is a checkbox labeled "Wells Fargo Home Mortgage, (cr:cr) represented by Miller, John (aty)". The checkbox is currently unchecked. Below the checkbox are two buttons: "Next" and "Clear".

Did you change any address information when the attorney was added to a case? If an attorney is added to a case and the filer edits the attorney information on the screen, a new record is created for the attorney. This new attorney is NOT registered for ECF, does NOT have an associated login and password and will NOT receive e-mail in the case. **MODIFY ATTORNEY INFORMATION USING UTILITIES, MAINTAIN YOUR USER ACCOUNT.**




The screenshot shows the 'Search for an attorney' form in the ECF system. It has a blue header with the ECF logo and navigation links: Bankruptcy, Adversary, Query, Reports, Utilities, Logout, and a help icon. The form contains two input fields: 'Bar Id' and 'Last name'. Below these fields are 'Search' and 'Clear' buttons.



The screenshot shows the 'Attorney search results' section. It features a dropdown menu with two options: 'Miller, John' (highlighted) and 'Miller, Mitch M.'. Below the dropdown are two buttons: 'Select name from list' and 'Create new attorney'.

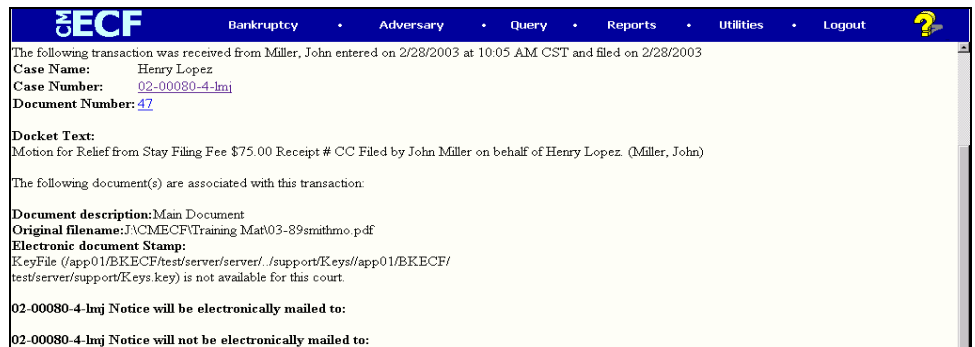
The attorney is only in the database one time.

His database address is shown below.



The screenshot shows the 'Attorney Information' form for John Miller. The header includes the ECF logo and navigation links. The form title is 'Attorney Information (Party Lopez, Henry)'. It displays 'John Miller Bar Id:150000001 Bar Status:Active'. The form contains several input fields for address, city, state, zip, phone, fax, and email. There are also 'Add attorney', 'Cancel attorney', and 'Clear' buttons. A note at the bottom states: 'Click the Add attorney or Cancel attorney button to return to the Party screen and add other attorneys, add aliases, or submit all information for this party.'

After filing the document in a case, he receives an e-mail of the transaction.



The screenshot shows an email notification from the ECF system. It has a blue header with the ECF logo and navigation links. The text of the email reads: 'The following transaction was received from Miller, John entered on 2/28/2003 at 10:05 AM CST and filed on 2/28/2003'. It lists 'Case Name: Henry Lopez', 'Case Number: 02-00080-4-lmj', and 'Document Number: 47'. It then provides the 'Docket Text: Motion for Relief from Stay Filing Fee \$75.00 Receipt # CC Filed by John Miller on behalf of Henry Lopez. (Miller, John)'. It also lists associated documents and provides a link to the document description. Finally, it states: '02-00080-4-lmj Notice will be electronically mailed to:' and '02-00080-4-lmj Notice will not be electronically mailed to:'.

John Miller
1234 Main St
Des Moines, IA 50309

Mr. Miller decides to change his address with entry of the next case.

The screenshot shows the CM/ECF Attorney Information form for John Miller. The form is titled "Attorney Information (Party Lopez, Henry)" and includes the following fields: Office, Address 1, Address 2, Address 3, City, State, Zip, Country, Phone, Fax, E-mail, and Lead attorney. The "Lead attorney" field is set to "yes". At the bottom of the form, there are three buttons: "Add attorney", "Cancel attorney", and "Clear". A note at the bottom right states: "Click the Add attorney or Cancel attorney button to return to the Party screen and add other attorneys, add aliases, or submit all information for this party."

Now Mr. Miller will not receive e-mail for his next case though he retained his e-mail address. The new party record is not registered for electronic filing.

Also, there are now **two** attorney records in the database for Mr. Miller.